

Global HBM Underfill Material Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global HBM Underfill Material market size is expected to reach \$ 123 million by 2032, rising at a market growth of 11.3% CAGR during the forecast period (2026-2032).

HBM underfill material is an advanced semiconductor packaging material used within multilayer high-bandwidth memory stacks, at the base-die interface, and between the completed HBM stack and the interposer. It fills microscopic gaps around micro-bumps and inter-die connections and, after curing, forms an electrically insulating and mechanically protective structure. The material distributes thermomechanical stress caused by coefficient-of-thermal-expansion mismatch, helping reduce solder-joint fatigue, interfacial delamination, die cracking, and package warpage while improving thermal, moisture, and long-term reliability. Depending on its physical form and application process, HBM underfill materials mainly include molded underfill or mass reflow molded underfill (MUF/MR-MUF), capillary underfill (CUF), non-conductive paste (NCP), and non-conductive film (NCF). MR-MUF uses a liquid protective material injected between stacked dies, while NCF uses a film-type insulating adhesive during thermo-compression bonding. In 2025, global HBM Underfill Material production reached approximately 30.2 tons, with an average global market price of around 1570 USD/kg. The production capacity for HBM Underfill Material in 2025 was approximately 35 tons. The typical gross profit margin for HBM Underfill Material between 20% and 40%.

The global HBM underfill material market is being driven by the rapid expansion of generative AI, AI servers, high-performance computing, and data-center accelerators. As HBM products advance toward HBM3E, HBM4, and HBM4E with higher stack counts, thinner dies, and finer micro-bump structures, underfill materials are required to deliver increasingly demanding performance in ultra-fine-gap filling, warpage control,

low coefficient of thermal expansion, thermal conductivity, ionic purity, and curing efficiency. SK hynix continues to apply Advanced MR-MUF technology to 12-layer HBM4 and HBM4E products to improve heat dissipation, structural stability, and warpage control, while the consumption of NCF per HBM device is also expected to increase as more memory dies are stacked. Suppliers with high-purity formulation expertise, fine-gap processing capability, reliable mass-production consistency, and qualification experience with leading memory manufacturers are therefore expected to gain a stronger competitive position. However, high development barriers, lengthy customer-validation cycles, and a concentrated customer base will continue to restrict rapid entry by new suppliers.

Report Scope

This report studies the global HBM Underfill Material production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for HBM Underfill Material and provides market size (US\$ million) and Year-over-Year (YoY) Growth, considering 2025 as the base year. This report explores demand trends and competition, as well as details the characteristics of HBM Underfill Material that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global HBM Underfill Material total production and demand, 2021-2032, (Tons)

Global HBM Underfill Material total production value, 2021-2032, (USD Million)

Global HBM Underfill Material production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Tons), (based on production site)

Global HBM Underfill Material consumption by region & country, CAGR, 2021-2032 & (Tons)

U.S. VS China: HBM Underfill Material domestic production, consumption, key domestic manufacturers and share

Global HBM Underfill Material production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Tons)

Global HBM Underfill Material production by Type, production, value, CAGR, 2021-2032, (USD Million) & (Tons)

Global HBM Underfill Material production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Tons)

This report profiles key players in the global HBM Underfill Material market based on the following parameters - company overview, production, value, price, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include NAMICS Corporation, Henkel, Resonac Corporation, Sumitomo Bakelite, Hubei Huitian New Materials, etc.

This report also provides key insights about market drivers, restraints, opportunities, new product launches or approvals.

Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the World HBM Underfill Material market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (Tons) and average price (US\$/kg) by manufacturer, by Type, and by Application. Data is given for the years 2021-2032 by year with 2025 as the base year, 2026 as the estimate year, and 2027-2032 as the forecast year.

Global HBM Underfill Material Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global HBM Underfill Material Market, Segmentation by Type:

Molded Underfill?MUF?

Capillary Underfill?CUF?

Global HBM Underfill Material Market, Segmentation by HBM Stacking Layers:

For 8-High and Below HBM

For 12-High HBM

For 16-High and Above HBM

Global HBM Underfill Material Market, Segmentation by Application:

AI Servers and Data Centers

Networking and Telecommunications

Automotive Electronics

Aerospace and Defense

Others

Companies Profiled:

NAMICS Corporation

Henkel

Resonac Corporation

Sumitomo Bakelite

Hubei Huitian New Materials

Key Questions Answered:

1. How big is the global HBM Underfill Material market?
2. What is the demand of the global HBM Underfill Material market?
3. What is the year over year growth of the global HBM Underfill Material market?
4. What is the production and production value of the global HBM Underfill Material market?
5. Who are the key producers in the global HBM Underfill Material market?
6. What are the growth factors driving the market demand?

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Figure 61. Methodology

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